

**MIDDLE ATLANTIC
Region 1
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Professional Development Award 2: ILLiad annual
conference
Albany College of Pharmacy and Health Sciences
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Executive Summary

The Albany College of Pharmacy and Health Sciences (ACPHS) is an urban campus in Albany, NY with a satellite campus in Colchester, Vermont. The student population is approximately 1,600 students. As an interlibrary lender and borrower, ACPHS Library uses Docline and OCLC and is a member of Docline FreeShare and the Capital District Library Council resource sharing groups. My coworker, Lauren Grygiel, and I share interlibrary loan (ILL) responsibilities. I do ILL lending while Lauren does ILL borrowing, but we are also cross trained in our duties.

In June 2011, the ACPHS Library purchased and installed ILLiad Resource Sharing System, a product of Atlas Systems, Inc. The version of this interlibrary loan processing program was ILLiad 8.1, which was brand new at the time. Since Lauren and I were so new to this product and its functions, I was certain that we would benefit from attending the ILLiad Conference.

The 2012 ILLiad International Conference was held March 21-23, 2012 in Virginia Beach, VA. The Conference included 1-3 hour long workshops and breakout sessions with topics ranging from the ILLiad program and web services to interlibrary loan best practices. The website for the conference is: <http://www.atlas-sys.com/conference/>.

Through the generosity of the NNLM/MAR, Lauren and I were both awarded professional development grants and were both able to attend the 2012 ILLiad International Conference. We decided to take advantage of this tremendous opportunity by attending different workshops so we could collect more information and ideas than one person alone could gather.

Minority Populations Served

African Americans: No
American Indians/Alaska Natives: No
Asian Americans: No
Hispanics/Latinos: No
Native Hawaiians and Pacific Islanders: No
Other: No

Approaches and Interventions Used

I chose which Conference sessions and events I would attend with certain objectives in mind. Not only was I hoping to learn more about ILLiad 8.1, I was also interested in learning more about ILLiad Addons, which are links to other programs that can assist in processing interlibrary loan (ILL). I also wished to learn how to populate information from the National Library of Medicine's PubMed website to a patron's ILLiad ILL request form and how to populate information from an ILLiad ILL request form to an ILLiad Addon. I hoped to create personal contacts for information sharing, which is vital to expanding one's knowledge and skills. Most importantly, I hoped to come away from the Conference able to use ILLiad as efficiently and effectively as possible.

The Conference sessions I attended were:

ILLiad Administrator – an overview of best practices and tips for administering our ILLiad system.

ILLiad Spring Cleaning – a session on best practices for maintaining our ILLiad system and keeping it running efficiently.

Service Delivery and Value: The Use of Data for Improvement and Assessment – using ILLiad reports with Microsoft Access to help libraries link academic library outcomes to institutional outcomes.

Tune in and Tune up: Improving Your ILLiad Workflow – a session filled with ideas on how to improve ILL workflow.

Request It! Using ILLiad to Integrate ILL/DocDel & Circulation Services – an example of how a library integrated ILLiad requesting into their online catalog (OPAC).

A Marriage of Convenience: Using Relias D2D with ILLiad for Unmediated Consortial Borrowing – an example of how a number of libraries implemented direct borrowing using Relias D2D and ILLiad.

Leveraging Link Resolvers to Speed Processing – using link resolvers and ILLiad Addons to increase workflow.

I also attended the following Conference events and keynote addresses:

ILLiad's 15th Birthday Bash, sponsored by Atlas Systems – cupcakes and music enjoyed by all!

A keynote address, Evolution: How Fast is Fast Enough, given by Jay Jordon, President and CEO of OCLC, about how ways to access information is rapidly changing and how institutions/libraries must adapt.

Break-out lunch for Medical Libraries – spoke with representatives from a number of medical libraries.

Poster Sessions with Wine & Cheese Social, Sponsored by Copyright Clearance Center

OCLC Update – The Future of Delivery from OCLC given by Katie Birch, OCLC – an overview of new products and platforms provided and in production by OCLC.

Atlas Update given by Genie Powell, Atlas Systems – an overview of ILLiad's new upgrades in ILLiad 8.2 and 8.3.

Evaluation Activities

I came away from the Conference with a better understanding of ILLiad 8.1. I learned about routing rules and other configurations that could be made in ILLiad's Customization Manager. I learned that ILLiad's Open URL Mapping table could be used to populate forms and ILLiad Addons but only with a URL link resolver (which our library is now budgeting). A link resolver could potentially provide unmediated borrowing, a huge time saver for library staff and patrons.

My conversations with colleagues at the Conference were enlightening and I kept quite a few business cards. Not only was interlibrary loan discussed, but I had conversations about OPAC systems and cataloging as well. I visited with PJ Grier at the NLM table and discussed a PubMed Addon I created. I truly enjoyed sharing ideas, creating contacts and putting faces with names at Atlas Systems, IDS and OCLC.

Problems or Barriers Encountered

n/a

Continuation Plans

After attending the ILLiad Conference, Lauren and I each made a list of ideas we thought would benefit our workflow and patrons. After briefing our Assistant Director of Library Services on the Conference and the ideas we'd like to implement, we came up with a list to work on:

1. Upgrade to ILLiad 8.3
2. Include the Article Exchange Addon to our ILLiad system to assist with Copyright Compliance
3. Customize more email and printing templates
4. Copy and paste email templates from C: drive to Customization Manager
5. For reports, split up our students by their year of study
6. Look into creating customized document delivery emails for faculty and 6th year students
7. Re-evaluate the wording on our patron interface to make registration and placing ILL requests even easier for our patrons
8. Customize our ILLiad homepage to provide a clearer overview of ILL services and ILLiad

Impact

The ILLiad International Conference gave me so many ideas on how to use ILLiad to automate interlibrary loan and document delivery processing. Since I returned, I put some of these ideas to good use.

At the Conference, I learned how to automate some email functions in ILLiad. After returning, I created a new Document Delivery email template. Now, when we use ILLiad to send an article to our patron from ACPHS Library's collection, an email is automatically sent notifying the patron that the article was obtained from our collection, where we found it and how to contact library staff with questions. We now have another teaching tool that will help our students find their own articles using our library's resources.

I am in the process of automating coversheets for ILL article delivery to other libraries through ILLiad. A PDF document, which gives our library's information as well as copyright information about the article, can be uploaded when we send an article through ILLiad and OCLC Odyssey. This will speed ILL Lending.

In July 2012, we are planning on upgrading to ILLiad 8.3, a decision made as a result of a presentation at the Conference made by Atlas Systems staff about the upgrade's enhancements. Patron records of graduated students will be deleted from our ILLiad system in August 2012 using ILLiad's Database Manager, another automation tool learned about at the Conference. This will keep our ILL database running efficiently.

I am truly grateful to the National Network of Libraries of Medicine for the opportunity to attend the 2012 ILLiad Conference. It was an enriching experience that has already impacted delivery of resources from the Albany College of Pharmacy and Health Sciences Libraries. My goal is to continue to implement the ideas presented at the Conference. I hope one day I can present a new idea at the ILLiad Conference.

Lessons Learned

I came away having learned how to customize our ILLiad system to better fit the needs of our patrons and speed interlibrary loan processing for both borrowing and lending. For example, one idea shared by a fellow Conference attendee was how to create an "extended search cue" for more difficult interlibrary loan requests. A request put in this new cue would generate an email to a patron stating that the difficult request might take a few more days than usual, thus keeping the patron more informed.

I found some of the most interesting topics discussed at the Conference were trends in libraries and library patronage in general. The use of text messaging versus email, lending electronic resources, copyright compliance, and technology trends (Kindles, iPads, iPhones, applications) were presented and discussed. Docline and PubMed Addons were talked about at the Lunch Table for Medical Libraries as well as EFTS.

I would highly recommend to any library that runs ILLiad for interlibrary loan to attend the International Conference. Not only do you learn about the ILLiad system you currently run, you learn about new products and features in development by Atlas Systems and OCLC. Since there were so many sessions offered at the Conference, it was great having my coworker, Lauren, with me to attend separate ones. This was key to maximizing our knowledge and experience at the Conference. All of the Conference sessions are posted at <http://www.atlas-sys.com/conference/conference-sessions/>.

Other

n/a

Attachment 1: AR summary data: Subcontractor activities